



# GOVERNOR GREG GIANFORTE DIRECTOR BRENDAN BEATTY

## Features of Third-Party Access in TransAction Portal (TAP)

### Home Page

- Clients are readily visible and selectable.

Logon

Information Governance  
dore-services@mt.gov

Welcome, Information Governance  
You last logged in on Tuesday, Feb 7, 2023 1:57:18 PM  
[Manage My Profile](#)  
[Accountant Center](#)

[Select a Customer](#) Favorites Action Center <sup>6</sup>

Who do you want to work with?

Filter

INFORMATION GOVERNANCE TESTING ACCOUNT <sup>1</sup>

7052121  
340 N LAST CHANCE GULCH HELENA MT 59601-5012

☆ Add to Favorites

TRANSACTION PORTAL BUSINESS TESTING ACCOUNT <sup>5</sup>

7052120  
340 N LAST CHANCE GULCH HELENA MT 59601-5012

☆ Add to Favorites

- They can be selected as Favorites for quicker access.

Logon

JR Accountant  
jraccountant@cpafirm.net

Welcome, JR Accountant  
You last logged in on Monday, Mar 13, 2023 11:26:19 AM  
[Manage My Profile](#) <sup>1</sup>  
[Accountant Center](#)

All [Favorites](#) Action Center <sup>4</sup>

Who do you want to work with?

Filter

CPA FIRM <sup>3</sup>

7074963  
340 N LAST CHANCE GULCH HELENA MT 59601-5012

★ Remove from Favorites

- The Homepage Action Center will show you any urgent actions needed or correspondence waiting.
  - It is also filterable by account type and action.

Logon

JR Accountant

jraccountant@cpafirm.net

Welcome, JR Accountant

You last logged in on Monday, Mar 13, 2023 11:26:19 AM

[Manage My Profile](#)

Accountant Center

All Favorites **Action Center**

Filters

All Account Types

All Actions

Filter

Withholding

7074963

CRA FIRM

340 N LAST CHANCE GULCH

HELENA MT 59601-5012

Withholding, MW3 for 31-Dec-2022 needs to be filed

A return needs to be filed. Returns filed late may be subject to a penalty.

[File Return](#)

Withholding, MW3 for 31-Dec-2021 needs to be filed

A return needs to be filed. Returns filed late may be subject to a penalty.

[File Return](#)

Withholding, MW3 for 31-Dec-2020 needs to be filed

A return needs to be filed. Returns filed late may be subject to a penalty.

[File Return](#)

TEST

MT Tax # 6734247

TESY

TEST CA 99999-9000

You have an unread message

Messages sent to you may contain important information about your accounts.

[View Messages](#)

- Once a singular customer is selected, the Customer View appears, showing all the accounts that you have access to.
  - Please note – The File Processing (FLE) account is for the electronic bulk filing of withholding documents. For more information, please go to: <https://mtrevenue.gov/taxes/#WageWithholdingTax>.

[Work with Someone Else](#)

CPA FIRM

MT Tax # 7074963  
 340 N LAST CHANCE GULCH  
 HELENA MT 59601-5012  
 ★ Remove from Favorites

Summary

Action Center <sup>1</sup>

Settings

More...

File Processing

CPA FIRM  
 340 N LAST CHANCE GULCH  
 HELENA MT 59601-5012

ID 7074963-002-FLE

[Upload W-2, 1099 or MW3 Files](#)  
[View Past Submissions](#)

Withholding

CPA FIRM  
 340 N LAST CHANCE GULCH  
 HELENA MT 59601-5012  
[Action Center Items](#) <sup>1</sup>

ID 7074963-003-WTH

Balance  
**\$0.00**

[Upload W-2 or 1099 Files](#)  
[Manually Enter Your W-2s or 1099s](#)  
[Make a Payment](#)  
[View Returns](#)  
[More...](#)

Your online session will timeout after 45 minutes of inactivity. Save your work if you will be away from your computer.  
 Department of Revenue | DOR Online Services | Department of Justice | Contact Us | Request Support ID | Help

## The Accountant Center

Logon

JR Accountant  
 jraccountant@cpafirm.net

Welcome, JR Accountant

You last logged in on Monday, Mar 13, 2023 11:26:19 AM  
[Manage My Profile](#) <sup>1</sup>  
[Accountant Center](#)

- A one stop to easily see full summaries for your clients, manage access to your and your clients' accounts, search all submissions made across all clients, view all correspondence for all clients.

**Accountant Center**  
Information Governance  
dore-services@mt.gov

**Accountant Center** **Action Center** <sup>6</sup>

🔍 *What are you looking for?*

**Access Management**

Manage access of accounts I have access to.

- > Add Third Party Account Access
- > Manage My Access
- > Manage Third Party Access

**Submissions**

Search for previous submissions.

- > Search Submissions

**Correspondence**

View/manage letters and messages.

- > View Letters
- > View Messages

**Payments & Returns**

Manage payments, returns, and balances.

- > Manage Payments & Returns

- **Activity Summaries – Manage Payments and Returns**

- These tables allow you to see recent activity for all your clients on one page.
- They are filterable by Account type, actions, and periods.

**Manage Payments and Returns**  
Information Governance  
dore-services@mt.gov

**Manage Payments and Returns**

**Accounts**

All ▾

**Show**

Payments ▾

Not Submitted ▾

**For Periods**

All ▾

Page 1 of 5

Export Filter

## Manage Payments and Returns

Information Governance  
dore-services@mt.gov

### Manage Payments and Returns

Accounts

All

All

Cannabis License

Cannabis Tax

Contractors Gross Receipts

Corporate Income Tax

Individual Income Tax

Livestock Per Capita

Marijuana Card and Permit

Media Loan-Out Withholding

Partnership

Small Business Corporation

Withholding

Show

Payments

Not Submitted

For Periods

All

< Page 1 of 5 >

Filter

Export

	Name	Account Type	Filing Frequency	ID
23	TRANSACTION PORTAL BUSINESS	Media Loan-Out Withhold	Annually	7052120-009-MLW
22	TRANSACTION PORTAL BUSINESS	Corporate Income Tax	Annual	7052120-005-CLT

## Manage Payments and Returns

Information Governance  
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### Manage Payments and Returns

Accounts

All

Show

Payments

Balances

Payments

Returns

For Periods

All

< Page 1 of 5 >

Filter

Export

## Manage Payments and Returns

Information Governance  
dore-services@mt.gov

### Manage Payments and Returns

Accounts

All

Show

Payments

Not Submitted

All

Not Submitted

Processed/Pending

Posted

Reversed

For Periods

All

Page 1 of 5

Export

Filter

Manage Payments and Returns

Accounts

All

Show

Balances

Outstanding

All

Outstanding

Credit

For Periods

All

Export

Balance	Period	Name	Account Type	Filing Frequency	ID
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Manage Payments and Returns

Accounts

All

Show

Returns

Not Filed

All

Filed

Not Filed

Processed/Pending

Required

For Periods

All

Export

Status	Period	Name	Filing Frequency	ID
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File: Media LCM 21 Dec 2022 TRANSACTION PORTAL BUSINESS TESS Media Lease Out Withholdings Annually 7052120-000-MUW

## Manage Payments and Returns

Information Governance

dore-services@mt.gov

### Manage Payments and Returns

#### Accounts

All

#### Show

Returns

Not Filed

#### For Periods

All

All

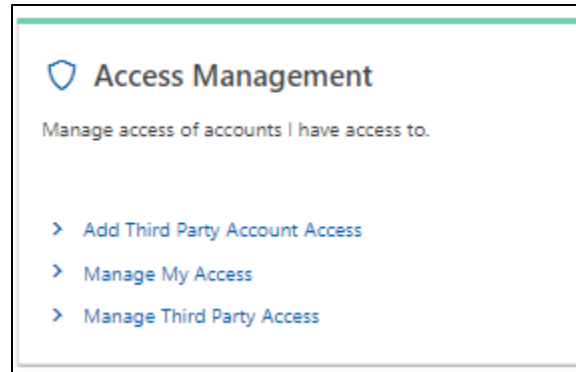
Current Period

Previous Period

Export

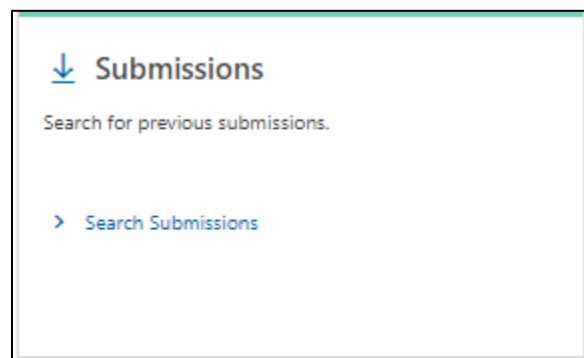
- **Access Management**

- Add Third Party Account Access
  - Request access to a new client/account.
- Manage My Access
  - Edit and/or remove your access to your current clients.
- Manage Third Party Access
  - Edit your account settings to allow or prevent third parties from gaining access.
  - Edit or remove the access that third parties have to your accounts.



- **Submissions**

- Search Submissions – allows you to view any submissions that have been made from your login.
  - NOTE! – This is where future dated payments will be seen!



- **Correspondence**

- View the letters or messages sent by the Montana Department of Revenue. This is a secure messaging system.

